

Cayuse SP – UC Davis

Role Managers Guide

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Role Definitions

Roles	Description
IPF Approver	<p>Has signing authority to review and approve proposals on behalf of his or her department.</p> <ul style="list-style-type: none"> • See the IPF Approvers Guide for details on this role. • Although all IPF Approvers in a department receive an email when a proposal requires review, only one IPF Approver is required to approve/reject the proposal. • If anyone other than a unit lead (Dept Chair, Center Director or Dean) is established as an IPF Approver, the unit lead must return the signed Cayuse SP Role Delegation Authorization form to ORCayuseHelp@ucdavis.edu.
Role Manager	<p>Designated by the Dean or Department Head to add and remove roles for departmental personnel within Research Contacts.</p> <ul style="list-style-type: none"> • Department Chairs/Center Directors and/or Deans may request a Role Manager be added to their unit by emailing ORCayuseHelp@ucdavis.edu. • The Role Manager updates his or her department's Research Contacts listings as personnel or job responsibilities change. • For backup purposes, the Sponsored Programs Office (SPO) recommends each department have at least two Role Managers.
Pre-Award Spending Approver	<p>Has signing authority to review and approve Pre-Award (Advance Account) spending requests.</p> <ul style="list-style-type: none"> • See the Pre-Award Spending Approvers Guide for details on this role. • Pre-Award Spending Approvers should additionally be provided the Proposal Data Access role in order to view the Proposal Attachments tab. • Although all Pre-Award Spending Approvers in a department receive an email when a Pre-Award Spending Request requires review, only one approver needs to approve/reject the request. • If anyone other than a unit lead (Dept Chair, Center Director or Dean) is established as a Pre-Award Spending Approver, the unit lead must return the signed Cayuse SP Role Delegation Authorization form to ORCayuseHelp@ucdavis.edu.
Proposal Data Access	<p>Can view a department's proposals and access proposals in which the department is named through the Proposals in My Department dashboard.</p> <ul style="list-style-type: none"> • Can perform the following tasks: view the proposal, its IPF and associated attachments; copy the proposal; and prepare a Pre-Award Spending Request for the proposal.
Award Data Access	<p>Can view departmental award data contained in Cayuse SP through the Awards in My Department dashboard.</p>
Research Account Manager	<p>The departmental contact who receives research-related correspondence via email for dissemination to appropriate departmental personnel.</p>

Option 1: From Research Contacts



Cayuse Research Suite

3.8.0

Research Administration Modules

- [Cayuse SP \(Sponsored Projects\)](#)
- [Cayuse 424](#)

System Administration Applications

- [Backbone](#)
- [Research Contacts](#)
- [Workflow](#)

Application Help

- [Research Suite Support Center](#)

Option 2: From Cayuse SP



Cayuse Research Suite

3.8.0

Research Administration Modules

- [Cayuse SP \(Sponsored Projects\)](#)
- [Cayuse 424](#)

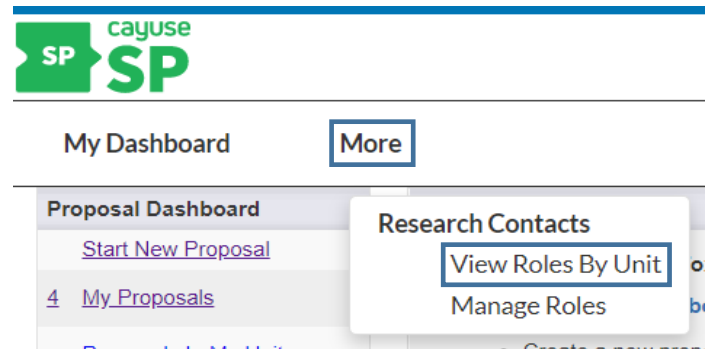
System Administration Applications

- [Backbone](#)
- [Research Contacts](#)
- [Workflow](#)

Application Help

- [Research Suite Support Center](#)

Then



View Unit Role Assignments

A one-minute video on viewing/identifying role assignments is available at <https://www.youtube.com/watch?v=6s3bTeVbw4>. If video doesn't start on first try, refresh and try again.

Find the unit.

- You can either click in the **search box** or on **List**.

My Dashboard

More

Contact Directory >> Unit List

Research Contacts provides access to contact information for personnel at UC Davis. You can view contact information by selecting a unit below.

>> Unit List

To view contact information for a unit, please choose one from the [list](#).

View

University of California Davis (0)

College of Agriculture/Env Sci (Non Admin/Home Dept) (01)

Agr & Env Sci Deans Office (030000)

CAES International Programs (030002)

Plant Sciences (030003)

UC Calfresh Nutrition Ed Prog (030009)

Food Chain Admin Cluster (Non Admin Dept) (030050)

Animal Science (030045)

Nutrition (030200)

Ag Biological Science Do (030071)

Avian Sciences (030100)

EPA Ctr Ecological Hlth Res (030191)

Metro Cluster (Non Admin Dept) (030250)

Environmental Toxicology (030160)

LAWR - Hydrology Program (Non Admin Dept) (030188)

Land Air & Water Resources (030190)

Wildlife & Fisheries Biology (030350)

Contact Directory >> Unit List

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>> Unit List

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Agr & Env Sci Deans Office

View

Users are listed on the left and the **Roles** on the right.

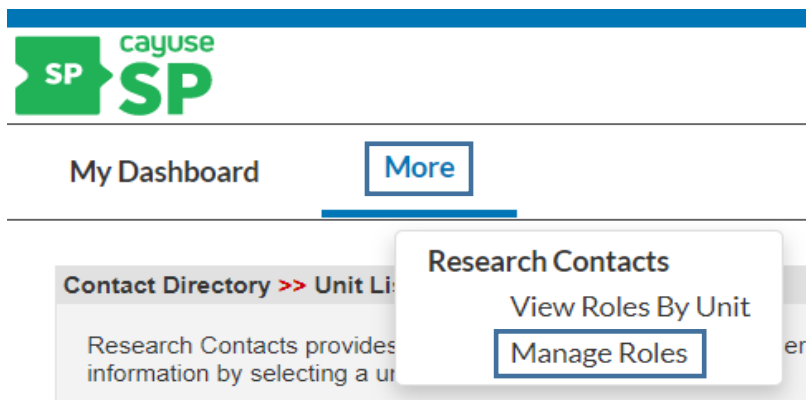
>> OVCR - Sponsored Programs						
Administrator	Title	Email	Phone	Fax	Campus Box	Roles
Admin, Amie					Davis CA 95618-6153	Role Manager, Proposal Data Access, IPF Approver
Apple, Charlie					Davis CA 95618-6153	IPF Approver, Pre-Award Spending Approver

Managing User Roles

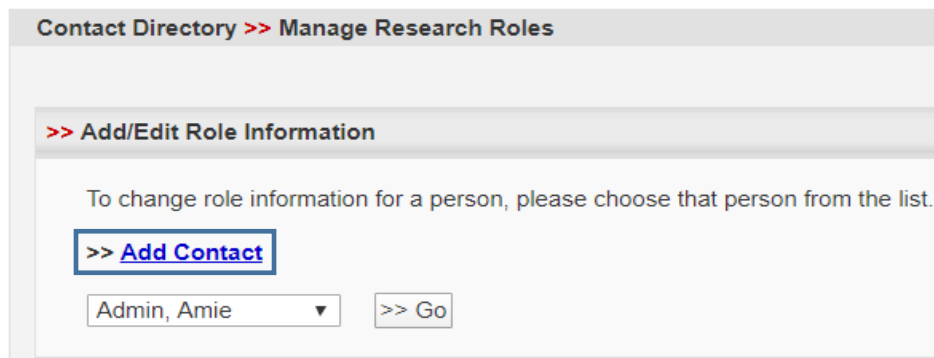
A three-minute video on how Role Managers add/remove roles in Cayuse is available at <https://www.youtube.com/watch?v=UYi7rwKOWy0>. If video doesn't start on first try, refresh and try again

Adding a Research Contact

Role Managers must first add an existing user as a **Research Contact** to assign departmental roles. From either **Cayuse SP** or the **Research Contacts** page, select **More** then **Manage Roles**.



If the user is not on the list, select **Add Contact**.



Search for the person to add:

A form for adding a new research contact. The form has fields for 'First Name:', 'Last Name:', 'Title:', 'Email:', 'Phone:', and 'Campus B'. The 'First Name' field is highlighted with a blue box and contains the text 'Click here to Select a Person'. Below the form, there is a search modal. The modal has the title 'Enter a keyword to locate the person you are looking for:'. Inside the modal, there is a text input field labeled 'Last name' with the word 'apple' entered. Below the input field, there are two buttons: 'Search' (highlighted with a blue box) and 'Cancel'.

Select the person's name you want to add in the search results.

Personnel Search (choose the person by clicking their name)

Apple, Charlie

OVCR - Sponsored Programs

Select **Add Contact**.

First Name:

Last Name:

Title:

Email:

Phone:

Campus Box:

Charlie

Apple

Davis CA 95618-6153

Add Contact

Cancel

Adding and Deleting Roles

Once a user is on the Research Contacts list, the associated roles may be viewed and edited.

From either **Cayuse SP** or the **Research Contacts** page, select **More** then **Manage Roles**.

My Dashboard

More

Contact Directory >> Unit List

Research Contacts provides information by selecting a unit

Research Contacts

View Roles By Unit

Manage Roles

Select the relevant person's name and then select **Go**.

Contact Directory >> Manage Research Roles

>> Add/Edit Role Information

To change role information for a person, please choose that person from the list.

>> Add Contact

Admin, Amie

>> Go

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Add a Role

Delete a Role

If you are a Role Manager for multiple units, select the relevant unit.

Role Department:
OVCR - Sponsored Programs

Select **Role** to add.

Role Department:
OVCR - Sponsored Programs

Select Role Below:

Award Data Access ▼	Add Role
Please Make A Selection	
Award Data Access	
IPF Approver (OVCR - Sponsored Programs)	
Pre-Award Spending Approver (OVCR - Sponsored Programs)	
Proposal Data Access (OVCR - Sponsored Programs)	
Research Account Manager (OVCR - Sponsored Programs)	

Select **Remove Role** next to the relevant role.

Role Department:
OVCR - Sponsored Programs

Select Role Below:

Award Data Access ▼	Add Role
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Current Roles:

Role Manager (OVCR - Sponsored Programs)	Remove Role
Proposal Data Access (OVCR - Sponsored Programs)	Remove Role
IPF Approver (OVCR - Sponsored Programs)	Remove Role

Select **Add Role**.

Role Department:
OVCR - Sponsored Programs

Select Role Below:

Award Data Access ▼	Add Role
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